

**WEB ACCESS
SPECIAL PATIENT NOTES
3.16**

Document Version	Date	Adastra Version	Comment
1.0	14/12/2010	3.14	Initial release

Contents

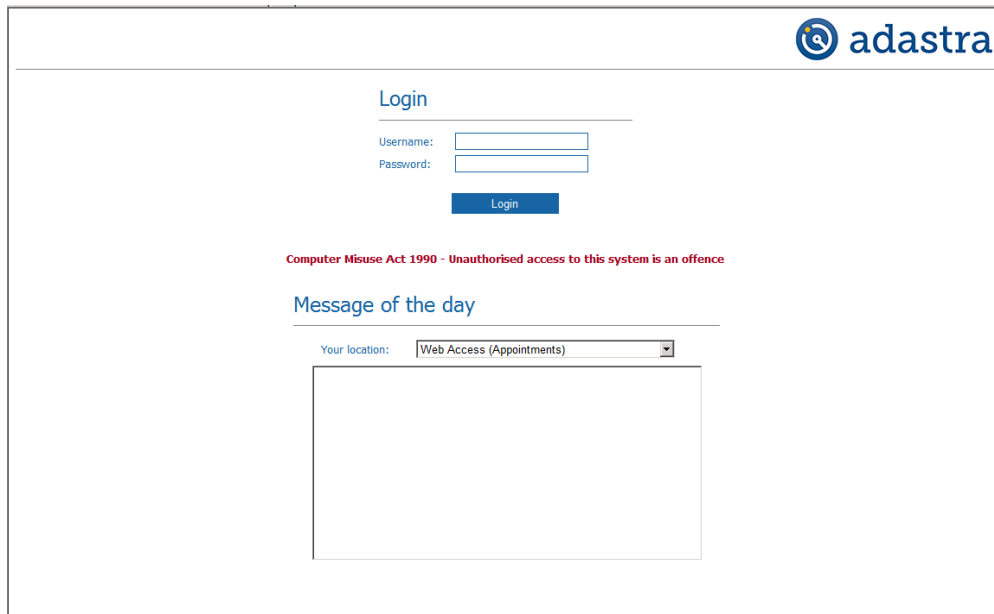
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What are SPN in Aداstra Web Access?

Special patient notes (SPN) in Aداstra Web Access are notes that can be attached to a patient to highlight any specific care requirements, long term care plans or any other item of useful information for the patient. They will show up in the main Aداstra v3 system when the patient contacts the service.


How to use SPN in Aداstra Web Access

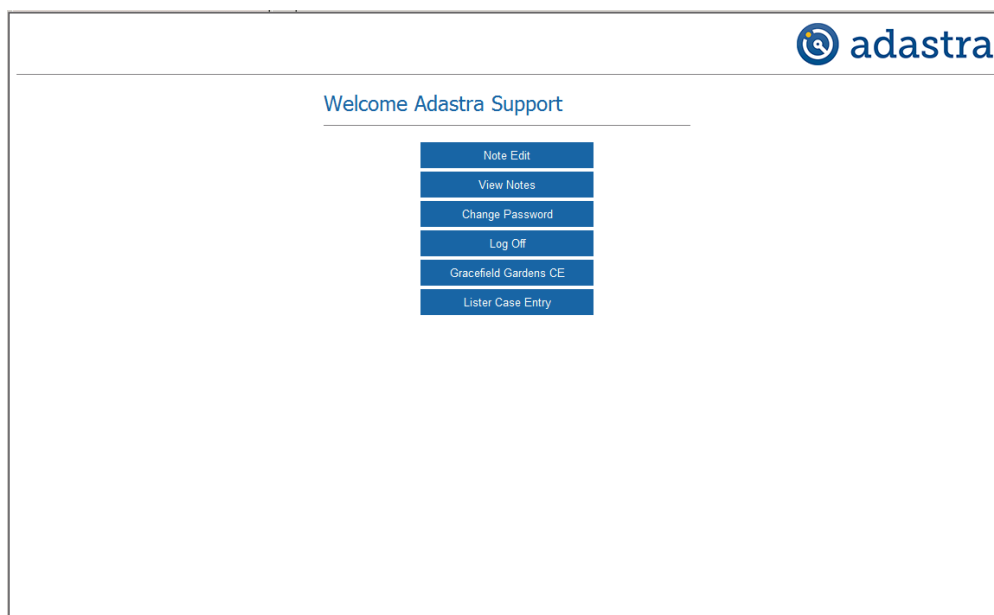
When opening Aداstra Web Access, the following screen will be displayed:



The screenshot shows the Aداstra Web Access login interface. At the top right is the Aداstra logo. Below it is a 'Login' section with two input fields for 'Username:' and 'Password:', and a blue 'Login' button. A red warning message reads: 'Computer Misuse Act 1990 - Unauthorised access to this system is an offence'. Below this is a 'Message of the day' section with a dropdown menu for 'Your location:' currently set to 'Web Access (Appointments)'. A large empty rectangular box is positioned below the dropdown menu.

Enter your username and password and select the correct location from the drop-down box in the middle of the screen.

Either click on the  button or press 'Enter' on the keyboard.



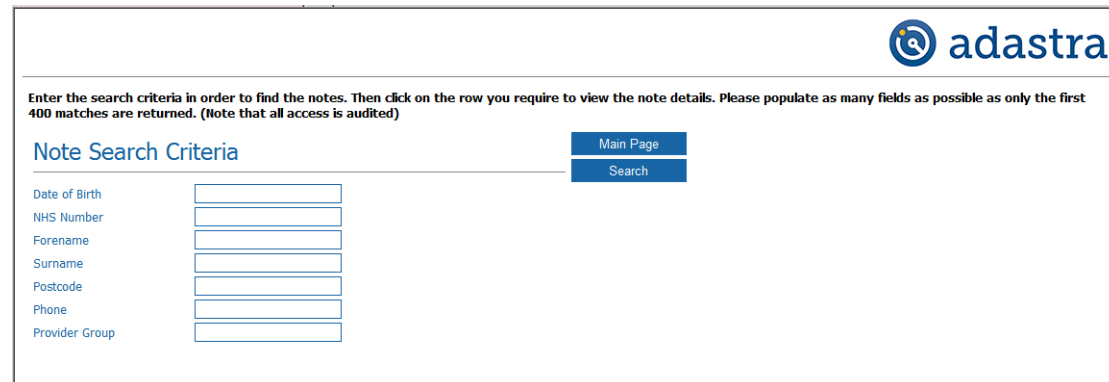
The screenshot shows the Aداstra Web Access 'Welcome Aداstra Support' screen. At the top right is the Aداstra logo. Below it is the heading 'Welcome Aداstra Support'. A vertical stack of six blue buttons is centered on the screen: 'Note Edit', 'View Notes', 'Change Password', 'Log Off', 'Gracefield Gardens CE', and 'Lister Case Entry'.

This helpsheet has been broken down into the following three sections:

1. Viewing existing notes
2. Adding a note to a new patient
3. Adding or editing a note for an existing patient

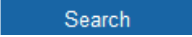
1. Viewing existing notes

To view existing notes, click on the  button. The following screen will be displayed:

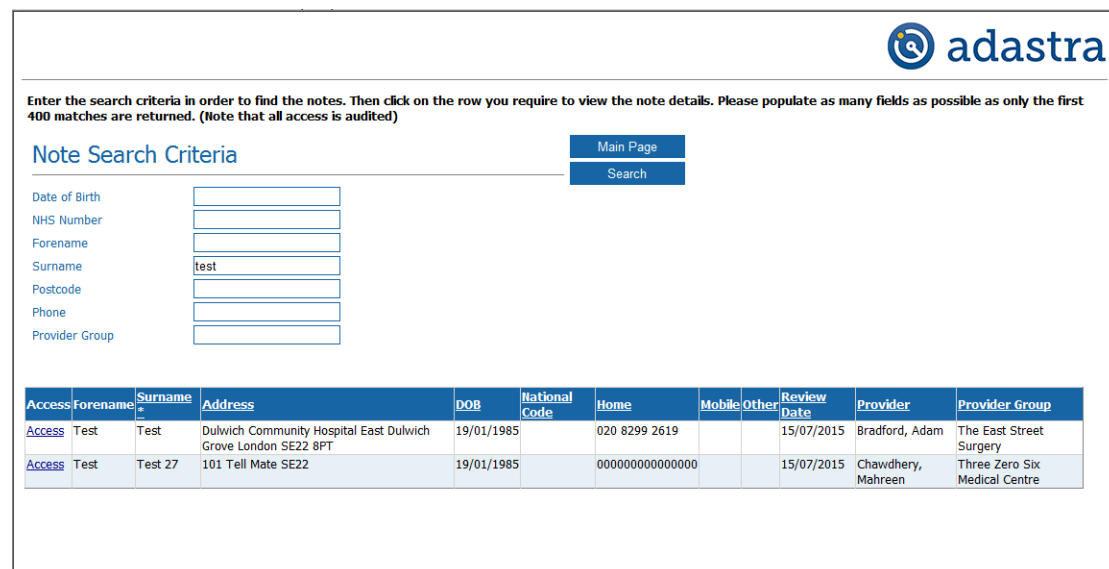


To search for notes, enter information into one or more of the free text boxes.

Please note – it is not possible to search on forename alone.

Click on the  button.

Any results will be displayed in the bottom section of the screen.



Access	Forename	Surname	Address	DOB	National Code	Home	Mobile	Other	Review Date	Provider	Provider Group
Access	Test	Test	Dulwich Community Hospital East Dulwich Grove London SE22 8PT	19/01/1985		020 8299 2619			15/07/2015	Bradford, Adam	The East Street Surgery
Access	Test	Test 27	101 Tell Mate SE22	19/01/1985		0000000000000000			15/07/2015	Chawdhery, Mahreen	Three Zero Six Medical Centre

If that search criteria does not return any results, the following message will be displayed:

No notes found. Please modify your criteria if you wish to search again.

The list of notes may be re-ordered by clicking on any of the column headers. The column by which the list is currently sorted has an asterisk (*) after the title.

To view a note, click on [Access](#) on the left-hand side of the patient details. The following screen will be displayed:

The screenshot shows the Adastra patient details page. At the top right is the Adastra logo. Below it, the text "Last Edited on 15/07/14 09:43 by Manoj Fernando" is displayed. The page is divided into several sections:

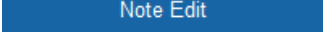
- Patient Demographics:** Includes fields for Gender (Male), Forename (Test), Surname (Test), DOB (19/01/1985), Provider Group (The East Street Surgery), Provider (Bradford, Adam), and NHS Number.
- Home Address:** Includes fields for Address (Dulwich Community Hospital, East Dulwich Grove), City (London), and Postcode (SE22 8PT).
- Contact Details:** Includes fields for Home Phone (020 8299 2619), Mobile Phone, and Other Phone.
- Note Settings:** Includes a field for Review Date (15/07/2015).
- Note Questions:** Includes a field for Template (Basic Note).
- Note Attachments:** Includes a large empty text area and a "View" button.
- Notes:** Includes a large text area containing the text "test test test".

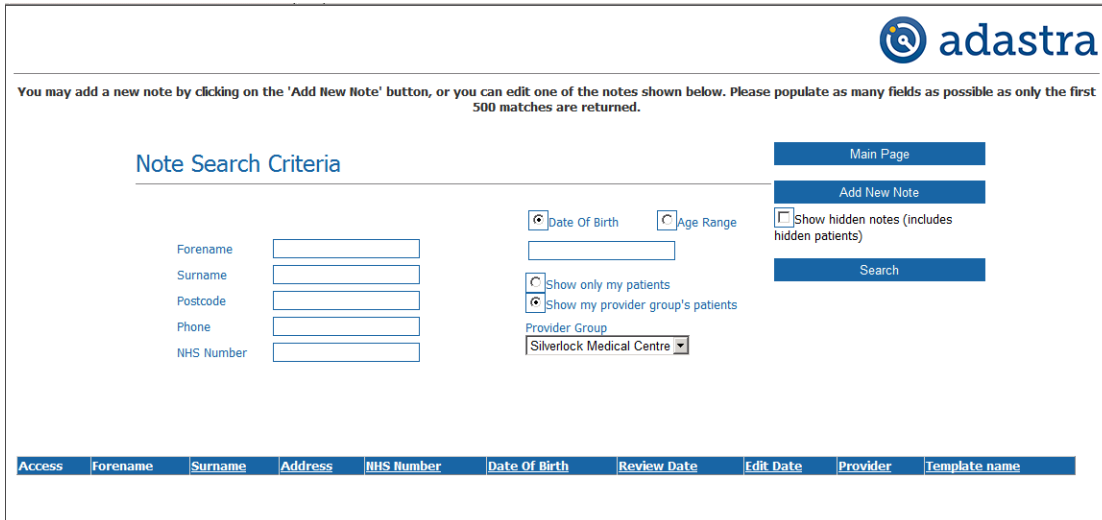
At the bottom of the page, there are two buttons: "New Search" and "Main Page".

To return to the search page, click on the [New Search](#) button.

To return to the main page, click on the [Main Page](#) button.

2. Adding a note to a new patient

To add a note for a new patient, click on the  button from the main page. The following screen will be displayed:



You may add a new note by clicking on the 'Add New Note' button, or you can edit one of the notes shown below. Please populate as many fields as possible as only the first 500 matches are returned.

Note Search Criteria

Forename

Surname

Postcode

Phone

NHS Number

Date Of Birth

Age Range

Show only my patients

Show my provider group's patients

Provider Group
Silverlock Medical Centre

Show hidden notes (includes hidden patients)

Main Page


Add New Note

Search

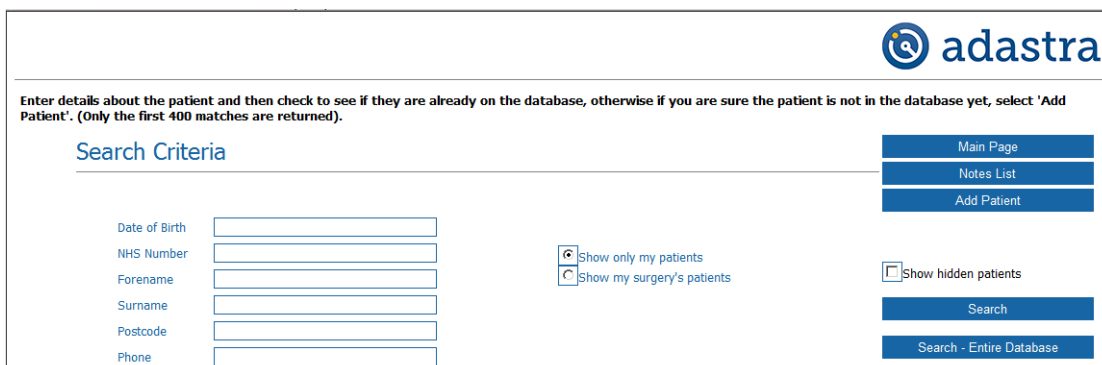
Access	Forename	Surname	Address	NHS Number	Date Of Birth	Review Date	Edit Date	Provider	Template name
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Enter some search criteria into one or more of the free text boxes to check whether the patient is already on the system.

Please note – it is not possible to search on forename alone.

Click on the  button.

Any results will be displayed in the bottom section of the screen. If there are no results, the following screen will be displayed:



Enter details about the patient and then check to see if they are already on the database, otherwise if you are sure the patient is not in the database yet, select 'Add Patient'. (Only the first 400 matches are returned).

Search Criteria

Date of Birth

NHS Number

Forename

Surname

Postcode

Phone

Show only my patients

Show my surgery's patients

Show hidden patients

Main Page

Notes List

Add Patient

Search

Search - Entire Database

By default, the system will only search for patients that are registered to the person that is logged in.

To search the database for any patients that are registered to the surgery that the person logged in belongs to, click on the radio button in the middle of the screen:

- Show only my patients
- Show my surgery's patients

To include any hidden notes or patients in the search, tick the check-box.

Show hidden notes (includes hidden patients) Show hidden patients

Click on the **Search** button again.

To search for patients on the system that are not registered to you or your surgery, click on the **Search - Entire Database** button.

The following screen will be displayed:

The screenshot shows the Aداstra logo in the top right corner. Below it, there are two red warning messages: "You must have a valid clinical reason for searching this database for patients." and "All searches are recorded in the audit trail for this page and may be investigated". Underneath, there is a section titled "Reason For Searching" with a large empty text input box. At the bottom of this section, there are two buttons: "Continue" and "Cancel".

Enter a reason for searching for a patient that is not registered to you or your surgery into the free text box.

Click on the **Continue** button. The following screen will be displayed:

The screenshot shows the Aداstra logo in the top right corner. Below it, there is a blue instruction: "Enter details about the patient and then check to see if they are already on the database, otherwise if you are sure the patient is not in the database yet, select 'Add Patient'. (Only the first 400 matches are returned).". On the right side, there are three buttons: "Main Page", "Notes List", and "Add Patient". Below these, there is a checkbox for "Show hidden patients" and a button for "Search - Entire Database". On the left, there is a section titled "Search Criteria" with several input fields: "Date of Birth", "NHS Number", "Forename", "Surname" (containing the text "test"), "Postcode", and "Phone". There is also a "Provider Group" input field. Below the search criteria, there is a section titled "Reason For Searching" with a large text input box containing the text "test,".

Click on the [Search - Entire Database](#) button again.

Any patients on the system that match the search criteria will be listed.

adastra

Enter details about the patient and then check to see if they are already on the database, otherwise if you are sure the patient is not in the database yet, select 'Add Patient'. (Only the first 400 matches are returned).

Search Criteria

Date of Birth
 NHS Number
 Forename
 Surname
 Postcode
 Phone

Provider Group

Show hidden patients

[Main Page](#)
[Notes List](#)
[Add Patient](#)
[Search - Entire Database](#)

Reason For Searching

Create Note	Forename	Surname	Address	NHS Number	DOB	Provider Group
Create Note	Joe	Test	Dulwich Community Hospital East Dulwich Grove London SE22 8PT		01/04/1978	Seldoc Ltd
Create Note	Ben	Test	Dulwich Community Hospital East Dulwich Grove London SE22 8PT		19/01/1985	Seldoc Ltd
Create Note	Jane	Test	Dulwich Community Hospital East Dulwich Grove London SE22 8PT		19/01/1980	Seldoc Ltd

To add a new patient to the database, click on the [Add Patient](#) button.

The following screen will be displayed which is broken down into the following sections:

- Patient demographics
- Home address
- Contact details
- Note settings
- Note questions
- Note attachments
- Notes

Please note – the sections can be completed in any order.



A 30 minute timeout applies to this screen. You will be prompted to renew your session 5 minutes before the end in order to continue working with this record. If you do not renew your session you will be logged out and any unsaved changes will be lost.

Patient Demographics

Gender:

Forename: *

Surname: * test

DOB:

Provider Group:

Surgery Details:

Provider: *

NHS Number:

Home Address

Address Lookup:

Address: *

Postcode:

Contact Details

Home Phone:

Mobile Phone:

Other Phone:

Note Settings

Review Date: * 05/08/2015

Service:

User can change selection

Initially selected

Mark this note as hidden

Mark this patient as hidden

Exclude this patient from the patient experience questionnaire?

Can share with an external agency (when attached to a case)

Can share with an external agency

Note Questions

Template:

Basic Note

Note Attachments

Filename:

Description:

Notes *

Patient demographics

Select the patient's gender from the drop-down box.

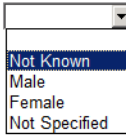
Patient Demographics

Gender:

Forename:

Surname:

DOB:



Type the patient's forename, surname and date of birth (DD/MM/YYYY format) into the corresponding fields.

Select the patient's provider group from the drop-down box.

Provider Group:

Surgery Details:



The surgery details will be automatically filled in.


Provider Group:

Surgery Details:

Select the patient's provider from the drop-down box. This field will not contain any providers until a provider group has been selected.

Provider:

NHS Number:



Enter the patient's NHS number if required.

Home address

The 'Address Lookup' field is used to search for the patient's address using part of their address, for example a postcode or combination of house number and postcode separated by a comma.

Click on the **Lookup** button to perform the search. Any matches will be displayed and can be selected by double-clicking. If only one exact match is found, this will automatically populate the address fields.

Home Address

Address Lookup: **Lookup**

Address:

Postcode:

Alternatively, enter the address manually.

Contact details

Enter any telephone numbers for the patient into the relevant field.

Contact Details

Home Phone:


Mobile Phone:

Other Phone:


Please note - a warning will be displayed if too few/many digits are entered.

Note settings

The review date will be automatically set to six months from the current date.

This can be changed by overtyping the date or clicking on the  icon and selecting the appropriate date.

Note Settings

Review Date: 

Service:

User can change selection

Initially selected

Mark this note as hidden

Mark this patient as hidden

Exclude this patient from the patient experience questionnaire?

Can share with an external agency (when attached to a case)

Can share with an external agency

To set which services are able see the note, select the appropriate service from the drop-down box.

Service:

User can change selection

Initially selected

Mark this note as hidden

Mark this patient as hidden

Exclude this patient from the patient experience questionnaire?

Can share with an external agency (when attached to a case)

Can share with an external agency

The check-boxes set the following options:

User can change selection	Sets whether the user entering a case for the patient can choose whether or not to attach the note to the case.
Initially selected	If checked, when the user entering a case selects the patient, the note will automatically be attached to the case.
Mark this note as hidden	Makes the note obsolete, and no longer available to attach to the patient (this option is available when reviewing a note).
Mark this patient as hidden	Makes the patient record obsolete; can be used if a patient dies, for example (this option is available when reviewing a note or patient record).
Exclude this patient from the satisfaction questionnaire?	Stops a satisfaction questionnaire from being sent to the patient by the out-of-hours service. For example, if a patient is incapable of completing the form or is terminally ill and does not need to receive such communications.

Can share with an external agency (when attached to a case)	Sets whether the note will be seen if the case is passed to external triage software for nurse assessment, for example.
Can share with an external agency	Sets whether the note can be shared with other external agencies. For example NHS Direct/NHS24.

Note questions

Select the appropriate template from the drop-down box.

Depending on the template selected, different questions will be displayed.

There are various types of questions including drop-down fields, checkboxes, yes/no, radio buttons, and free-text.

Some questions may only be displayed depending on the answer to the previous question.

Any mandatory fields will have a red asterisk next to them.

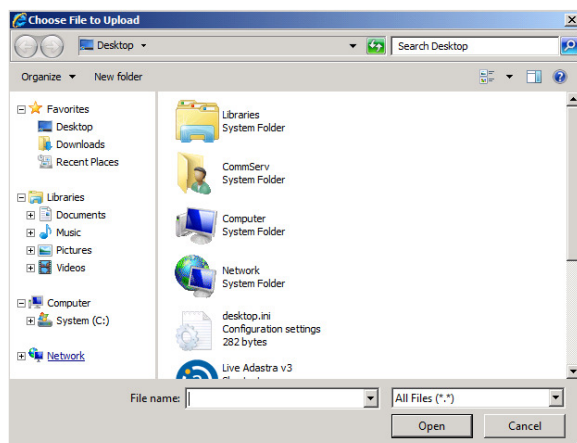
Complete all of the relevant information.

To select a different template, click on the **Alter Template** button, then select the appropriate template from the drop-down box.

Note attachments

It is possible to attach documents to the note.

Click on the **Browse...** button to search for the document.



Double-click on the document which is to be attached.

Enter a description for the document and click on the **Attach** button.

The note will be attached.

Please note - it is possible to add multiple attachments.

To view an attachment, highlight it and click on the **View** button.

To delete an attachment, highlight it and click on the **Remove** button.

Notes

Add any free text information into the 'Notes' box.

Please note - this is a mandatory field.

To add this note to the patient record, click on the **Add** button in the bottom left-hand corner of the screen.

To cancel all of the information entered, click on the **Cancel** button in the bottom left-hand corner of the screen.

3. Adding or editing a note for an existing patient

Adding a note to an existing patient

Follow the steps on searching for a patient as detailed on page six. The search results will be displayed:

The screenshot shows the Aداstra search interface. At the top right is the Aداstra logo. Below it is a search instruction: "Enter details about the patient and then check to see if they are already on the database, otherwise if you are sure the patient is not in the database yet, select 'Add Patient'. (Only the first 400 matches are returned)." The "Search Criteria" section includes input fields for Date of Birth, NHS Number, Forename, Surname (containing "test"), Postcode, and Phone. There is also a "Provider Group" field and a "Show hidden patients" checkbox. A "Search - Entire Database" button is present. Below the search criteria is a "Reason For Searching" section with a text area containing "test,". At the bottom, a table displays search results:

Create Note	Forename	Surname	Address	NHS Number	DOB	Provider Group
Create Note	Joe	Test	Dulwich Community Hospital East Dulwich Grove London SE22 8PT		01/04/1978	Seldoc Ltd
Create Note	Ben	Test	Dulwich Community Hospital East Dulwich Grove London SE22 8PT		19/01/1985	Seldoc Ltd
Create Note	Jane	Test	Dulwich Community Hospital East Dulwich Grove London SE22 8PT		19/01/1980	Seldoc Ltd

Click on [Create Note](#) on the left-hand side of the patient details. The following screen will be displayed:

The screenshot shows the Aداstra patient details form. At the top right is the Aداstra logo. Below it is a red warning message: "A 30 minute timeout applies to this screen. You will be prompted to renew your session 5 minutes before the end in order to continue working with this record. If you do not renew your session you will be logged out and any unsaved changes will be lost." The form is divided into several sections:

- Patient Demographics:** Includes fields for Gender (Male), Forename (Joe), Surname (Test), DOB (01/04/1978), Provider Group, Surgery Details, Provider, and NHS Number.
- Home Address:** Includes an Address Lookup field, a "Lookup..." button, and fields for Address (Dulwich Community Hospital, East Dulwich Grove, London) and Postcode (SE22 8PT).
- Contact Details:** Includes fields for Home Phone (020 8299 2619), Mobile Phone, and Other Phone.
- Note Settings:** Includes a Review Date field (06/08/2015) and checkboxes for "User can change selection" and "Initially selected".

The patient's demographic and contact details should already be populated. They may be amended or added in this screen if appropriate.

Select the appropriate note settings.

Select the appropriate template from the drop-down box and enter the information.

Note Questions

Template: Basic Note

Basic Note

Note Attachments

Filename:

Description:


Notes

Enter some free text into the 'Notes' section.

Click on the button to save the note.

Editing an existing note

Follow the steps on searching for a patient as detailed on page six. The search results will be displayed:




Enter the search criteria in order to find the notes. Then click on the row you require to view the note details. Please populate as many fields as possible as only the first 400 matches are returned. (Note that all access is audited)

Note Search Criteria Main Page
Search

Date of Birth:
 NHS Number:
 Forename:
 Surname:
 Postcode:
 Phone:
 Provider Group:

Access	Forename	Surname	Address	DOB	National Code	Home	Mobile	Other	Review Date	Provider	Provider Group
Access	Test	Test	Dulwich Community Hospital East Dulwich Grove London SE22 8PT	19/01/1985		020 8299 2619			15/07/2015	Bradford, Adam	The East Street Surgery
Access	Test	Test 27	101 Tell Mate SE22	19/01/1985		0000000000000000			15/07/2015	Chawdhery, Mahreen	Three Zero Six Medical Centre

Click on **Access** on the left-hand side of the patient details. The following screen will be displayed:



A 30 minute timeout applies to this screen. You will be prompted to renew your session 5 minutes before the end in order to continue working with this record. If you do not renew your session you will be logged out and any unsaved changes will be lost.

Patient Demographics

Gender:
 Forename:
 Surname:
 DOB:
 Provider Group:
 Surgery Details:
 Provider:
 NHS Number:

Home Address

Address Lookup: Lookup...

Address:

 Postcode:

Contact Details

Home Phone:
 Mobile Phone:
 Other Phone:

Note Settings

Review Date:
 Service:
 User can change selection
 Initially selected
 Mark this note as hidden

Edit the patient and/or note details as appropriate.

If the note is no longer appropriate for the patient, it can be marked as hidden by ticking the check-box in the 'Note settings' section.

Note Settings

Review Date:
 Service:
 User can change selection
 Initially selected
 Mark this note as hidden

Configuration settings for SPN in Aداstra Web Access

User configuration settings

There are no applicable user settings for this module.

System configuration settings

Any requests for configuration should be directed to Consultancy at AHCConsultancy@advancedcomputersoftware.com